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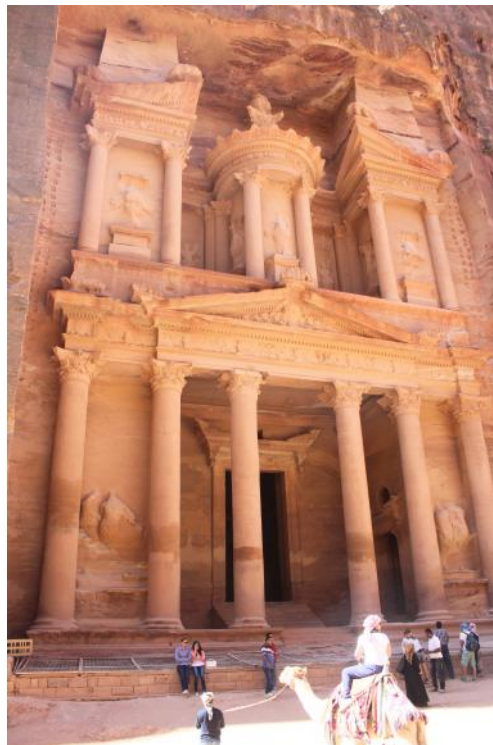
## **REPORT**

From the training

# **“CLARIFY COMPONENTS AND PRESENTATION OF CITIZEN BUDGET AND MID-YEAR REVIEW WITH THE GENERAL BUDGET DEPARTMENT (GBD)”**

Organized by the  
Financial Services Volunteer Corps (FSVC)

**Prepared by Marjan Nikolov-consultant**



**22 October 2014  
Gaziantep, Turkey**

**Background.** The Consultant/trainer was engaged by the FSVC to conduct a 3 days training on clarifying components and presentation of Citizen Budget-CB and Mid Year Review-MYR from 18 to 20 of October 2014 for the Jordanian central government staff, more precisely the General Budget Department and the Ministry of Finance-MF staff.

From organizational aspect this training went in best order and in accordance with previously set goals and directions.

From the aspect of possible risks (educational and skill's background of participants, dedication, expectations etc), most risks were mitigated due to a series of consultations with FSVC's Country Director Ms. Danyelle Gerges during several Skype conversation and e-mails exchange as well as consultation with the other FSVC consultant Ms. Phyllis Resnick. Careful preparations were also done regarding the developing the agenda (each previous day for the next day's training) as of the content of the presentations, coordination of discussion, receiving good briefing materials for the subject matter in relation to the Jordanian context. Instrumental for the training was also Ms. Rasha Abdelatif the Project Coordinator for Partners-Jordan.

The agenda was covered without any changes on day one. By the end of day one we did scrutinized the predetermined agenda and made more detailed training agenda that will suit the characteristics of Jordanian context and the needs of GBD and MF staff. Similar adjustments were done for day three.

**Main goal:** Participants to acquire awareness about the:

- Open budget initiative-OBI requirements related to CB and MYR content and dissemination,
- Criteria for more comprehensiveness of CB so that it can reach and can be understood by as much as possible larger share of population of Jordan and to keep the Jordanian characteristics,
- Criteria for more comprehensiveness of MYR so that it can reach and can be understood by as much as possible larger share of population of Jordan and to keep the Jordanian characteristics,
- Role of actors in the fiscal transparency and accountability within the public financial management: government, parliament and parliamentary commissions, public, media, NGO sector and business associations.

**Training methods:** Power point presentations, examples of CB and MYR from other countries, guidelines prepared by OBI, IMF and OECD related to CB and MYR preparation and dissemination, facilitating discussion, hands on work in working groups, and analysing case studies.

The training was structured in a way to provide participants in the beginning of the training day with background knowledge of main categories and context in order to be able to understand and comprehend the hands on work in the working groups.

**Observations:**

## **FIRST DAY**

### **Meeting within the GBD and with CSOs in Patners-Jordan premises**

The meeting with GBD was informative and the consultant was able to present the work of the Center for Economic Analyses-CEA on the first Macedonian Citizen Budget ever prepared. The importance of having a strategic plan behind preparation and dissemination of the CB is very important. Also, the

involvement and participation of citizens in the process (focus groups, interviews, questionnaire, invitation with teaser questions in the CB itself and/or leaflet preparation).

The meeting within the Partners-Jordan premises was used to discuss the view of CSOs in the process of preparation and dissemination of CB. In that meeting was also present Mr. Mohammad Masadeh, local contact for the OBI. The consultant and Mr. Mohammad shared the experience of OBI survey preparation in Jordan and Macedonia.

## **SECOND DAY**

### **Training day 1**

The team had a meeting with Dr. Izzeddine Kanakrieh – Secretary General of the Ministry of Finance. The importance of the increased transparency and budget preparation participation was stressed during the meeting as well as the importance of informing citizen with more comprehensive CB.

Later, Dr. Izzeddine Kanakrieh opened the training. The consultant presented the OBI program, the OBI survey, the mission and goal of this program and why it is important. This was important in order for the participants to understand the context of CB and MYR preparation and that this OBI initiative is conducted in 100 countries world wide.

After the consultant gave the overview it introduces Mr. Mohammad Masadeh, local contact for the OBI to explain the OBI survey for Jordan for 2012.

GBD staff presented the Jordanian CB and the consultant presented the characteristics of a CB that could qualify within the OBI questionnaire as a comprehensive and transparent document. This was important so that the hands on working group could work on the three main sections of the Citizen Budget (selected during the discussion):

- 1- Budget outlook for 2014 (2015)
- 2- Why does the Government of Jordan borrow?
- 3- List of capital projects

Exercise for the working groups was to:

- Choose team leader and reporter
- Work on discussion points (content of CB and dissemination timing, tactics and instruments)

At the end of the training day the reporters presented their work and suggestions and a final discussion followed. The examples of CBs from all over the world was left for the next day as well as the roundtable discussion on integration of international best practices in Citizen Budget for Jordan and the wrap-up discussion.

**Consultant's observation is that the Jordanian GBD and Ministry of finance have the capacity, understanding and knowledge to have a CB prepared and disseminated in accordance with the OBI survey. They should work more on coordination between sectors, to increase inclusiveness and participation of CSOs in the process and to make a better flow of the CB's sections all in order to make the CB readable and reachable to as large as possible share of citizens in Jordan.**

## THIRD DAY

### Training day 2

During this day we started to present examples of CB from all over the world. The Macedonian CB was presented in more details together with the strategic process of its preparation and dissemination. Discussion and training of CB was ended with a wrap up from the GBD staff as of content and dissemination of the future Jordanian CB.

The training day continued with the presentation and short discussion of the Jordanian budget process. This was important in order to open the discussion of when and how to prepare the MYR and what the content of it should be.

The consultant gave an overview as of what MYR is, why it is different from the monthly In-Year-Reports, what is the minimum the MYR should have as content and how it is scrutinized within the OBI survey. Again participants were divided in two working groups with hands on work to come up with possible content of the MYR. The groups came with suggestions of the content of the MYR and they all agreed on a possible content. The wrap up discussion was focused on data availability issues and who will do what (MF and GBD).

**Consultant's observation is that the Jordanian GBD and Ministry of finance have the capacity, understanding and knowledge to have a MYR prepared and disseminated in accordance with the OBI survey. They should work more on coordination between sectors and to prepare MYR that is readable and reachable to as large as possible share of citizens in Jordan. MF already prepares Monthly Financial Outlooks-MFO that have a lot of information that can be used in their future MYR and this MFO can serve as a good starting base to prepare proper MYR.**

Participants of the training



## **Predetermined general agenda of the training:**

**Date: October 18<sup>th</sup>-20<sup>th</sup>**

**Place: Amman, Jordan**



### **Clarify Components and Presentation of Citizen Budget and Mid-Year Review** *October 18–20, 2014*

**FSVC Volunteer experts:**

**Ms. Phyllis Resnick**  
**Mr. Marjan Nikolov**

Saturday October 18, 2014

10:00am Meeting with the General Budget Department (GBD) HE Director General Dr. Al Hazaimeh,

14:00pm Meeting with the CSO coalition

- Mohammad Masadeh, local contact for the OBI
- Rasha Abdelatif, Project Coordinator for Partners-Jordan

Possible topics for the meeting discussion

- Interactive discussion about goals for the citizens' budget
- Review previous versions of the citizens budget
  - Is GBD and Partners-Jordan happy with the content
  - If not, identify ideal components in a citizens budget
  - Identify target audience – which citizens
- Identify impediments to completing a timely citizens' budget
- Identify dissemination mechanism (s)
  - Example from ACODE in Uganda

Sunday October 19, 2014

Participants: General Budget Department, Ministry of Finance and CSO representatives

Topics to cover: Implementation and Dissemination of Citizens budget

09:30 – 10:50

- Introductions and Objectives
- What is the Open Budget Index?
  - Discussion about the key budget documents as per IBP in Jordan (timing, quality).
  - Short discussion to analyze strength and weaknesses of the OBI score for Jordan
- Brief Ministry of Finance on discussions from previous day
  - Wrapping up and structured around:
    - Process of developing the Citizen Budget-CB
    - Content of Citizen Budget
    - Dissemination of Citizen Budget

10:50 – 11:40

- Break – FSVC Volunteer Experts meeting with HE Secretary General Dr. Izzeddine

11:40 – 12:30

- Responsibilities of GBD vs. MoF (CB and MYR)
- Coordination needed for comprehensive effort on the OBI scoring for Jordan

12:30 – 13:30

- More detailed discussion of process, content and dissemination of citizens budget

13:30 – 13:40

- Break

13:40 – 15:00

- Develop draft strategy for timely development and dissemination of citizens budget
  - Partnerships and coordination with CSOs
    - Lessons from the Ugandan process
    - Lessons from Macedonian process

Materials:

- Materials from CSBAG meetings in Kampala

Monday October 20, 2014

Participants: Ministry of Finance, General Budget Department and CSO representatives

Topics to cover: Mid Year Review - MYR

10:00 – 11:30

- Discussion about the budget process in Jordan
  - Role of GBD
  - Role of Ministry of Finance

11:30 – 11:40

Break

11:40 – 13:00

- Content of MYR: Key sections, components and objectives of the MYR

13:00 – 14:00

- How the Ministry of Finance can use the current Financial Bulletins to produce a MYR

14:00 – 14:45

- Timing of issue of MYR

14:45 – 15:00

- Coordination on OBI budget documents

Materials:

- Previous versions of Jordanian citizens budgets
- ACODE from [http://www.acode-u.org/documents/Infosheet\\_17.pdf](http://www.acode-u.org/documents/Infosheet_17.pdf), other materials from meeting with CSBAG in Kampala

- Rwandan citizens budget document
- Ghana Citizen budget: <http://www.mofep.gov.gh/?q=news/271113/2014-citizens-budget>
- OECD Guide to Citizen budget: <http://www.oecd.org/gov/budgeting/48170438.pdf>
- OBI Guide to transparency in Government budgets from: [http://internationalbudget.org/wp-content/uploads/Government\\_Transparency\\_Guide1.pdf](http://internationalbudget.org/wp-content/uploads/Government_Transparency_Guide1.pdf)
- OBI Citizen budget guide: <http://internationalbudget.org/wp-content/uploads/Citizen-Budget-Guide.pdf>
- OBI Training materials for the Governments; Mid term review: <http://internationalbudget.org/wp-content/uploads/OBI-MG-Training-Mid-Year-Review.pdf>
- OBS for Jordan: <http://internationalbudget.org/what-we-do/open-budget-survey/country-info/?country=jo>
- IMF's Fiscal Transparency Code and Evaluation at [www.imf.org/fiscaltransparency](http://www.imf.org/fiscaltransparency)
- Revisions to the PEFA Framework at <http://www.pefa.org/>
- OECD Principles for Budgetary Governance at <http://www.oecd.org/gov/budgeting/>
- Examples of other country's CB from: Guatemala, India, Kazakhstan, Kenya, Mexico, New Zeland, South Africa.

**More detailed agenda of the training day 2:**

**Date: October 18<sup>th</sup>-20<sup>th</sup>**

**Place: Amman, Jordan**



**Consultation to clarify components and presentation of Citizen Budget and Mid-Year Review  
– October 19-23, 2014**

**Addendum to Agenda for October 19, 2014**

11:30-11:40 AM	Opening Speech by Dr. Izzeddine Kanakrieh – Secretary General of the Ministry of Finance
11:40-11:50 AM	Overview of Program by Danyelle Gerges – FSVC
11:50-12:00 PM	Introductions
12:00-12:10 PM	Overview of OBI from FSVC Experts – Marjan Nikolov and Phyllis Resnick
12:10-12:20 PM	Overview of OBI Jordan Survey – Mohammad Masa’deh
12:20-12:30 PM	Break
12:30-12:40 PM	Discussion Point: What are the main sections of the Citizen Budget for Jordan? Listing the main sections
12:40-1:00 PM	Group work around the three main sections of the Citizen Budget: 4- Budget outlook for 2014 (2015) 5- Why does the Government of Jordan borrow? 6- List of capital projects Exercise: - Choose team leader - Work on discussion points
1:00-1:20PM	Team leader recommendations for making Citizen Budget for Jordan more accessible
1:20-1:30PM	Break
1:30-2:15PM	Discussion Point: International perspectives on the Citizen Budget; the experience of Macedonia, Uganda, Rwanda and Ghana
2:15-3:00PM	Discussion Point: Roundtable discussion on integration of international best practices in Citizen Budget for Jordan and wrap-up



**More detailed agenda of the training day 3:**

**Date: October 18<sup>th</sup>-20<sup>th</sup>**

**Place: Amman, Jordan**



**Consultation to clarify components and presentation of Citizen Budget and Mid-Year Review  
– October 19-23, 2014**

**Addendum to Agenda for October 20, 2014**

10:00-10:20 AM	Overview of Citizen Budget from Macedonia
10:20-10:45 AM	Overview of Citizen Budget from Rwanda and Ghana
10:45-11:15 AM	Wrap up of discussion on recommendations for Citizen Budget for Jordan
11:15-11:30 AM	Break
11:30-12:00 PM	Budget Process overview: <ul style="list-style-type: none"><li>- Current processes in place for monitoring the budget execution.</li><li>- Ensuring Sound Management of the Budget</li></ul>
12:00-12:45 PM	Overview of Mid-Year Review components and examples
12:45-1:00 PM	Questions and discussion
1:00-1:30 PM	Exercise on structuring a Mid-Year Review for Jordan
1:30-2:45 PM	Discussion to draft a Mid-Year Review for Jordan
2:45-3:00 PM	Wrap up of discussion

**List of participants:**

**Evaluation:**